Broker Online Enrollment Portal FAQ

Login Process

Q: Where do we go to access this portal?

A: An invitation to login to the portal will be emailed early next week (10/14).

Q: Will you allow email two-factor authentication rather than text?

A: Yes. When you login, you will be given the option to receive the code via text or email.

Scope of Appointment

Q: Do we need to upload our SOAs into this system?

A: You are not required to submit the SOA with the application but SOAs should be available if requested. You can upload a paper SOA in this system for your convenience. The portal will allow the application to be completed without the SOA or E-SOA.

Q: Can the E-SOA be signed by a Power of Attorney or person authorized by the beneficiary?

A: Yes. The 'Signatory' section of the form allows you to select if the Beneficiary or their Authorized Representative signed to SOA. If an Authorized Representative signed, please complete the lower portion of the E-SOA with their information. The Authorized Representative is not the agent.

Application Completion

Q: Can the portal be used for 2024 enrollments?

A: No, the online enrollment portal is available for 2025 enrollments only.

Q: If we need to update/change the application, can we toggle back? How do we go backwards?

A: There is a 'previous' button located on the bottom right of each page.

Q: Once the Eligibility Check feature is active, can we check eligibility if they have the old format MBI number?

A: No. CMS no longer allows lookup using old formats or SSN.

Q: If I am an independent agent contracted with an agency that is not appointed by Samaritan, what do I enter in the 'Agency' field?

A: The drop-down box will display your name to select name as the 'agency' and the Agent Type field will display "Independent".

Q: On the paper application, is it required to document the PCP?

A: PCP selection is not required on the paper or electronic application versions. However, all health plans are required to assign a PCP. It is highly recommended that you capture their current PCP at the time of enrollment to reduce future member abrasion.

Q: What if the member wants their premium payment to be taken out of the SSA benefits?

A: Automatic deduction from SSA benefits is an option in the 'Premium Payment Method'. If you cannot see all premium payment options on your screen, try minimizing the zoom on your browser.

Q: What if my client does not want to answer the Beneficiary Status Questionnaire?

A: The only required questions are #5 and #6 to move on to the next screen. There is an option for "I choose not to answer/Application left blank".

Q: Can I upload a paper signed application?

A: You can make all your applications electronic by loading the data into the broker portal. Either the agent or their agent's staff can enter paper application data into the portal as a new application and upload the original paper version that includes the client's 'wet' signature.

Q: Will we need to submit an AOR (agent of record) form with the application?

A: No, this is not required.

Application Status

Q: Where can I see the status of an application that I submitted?

A: The 'View Application' option in the left menu will display the status of the application. Once the application is accepted by CMS and enrolled, it will be displayed on the 'Book of Business'.

Q: I submitted an application and do not see it on the application list.

A: Check the 'Book of Business' menu option to confirm the application has been approved and the member enrolled. If the application is not visible in the 'View Application' or 'Books of Business' menu options, please reach out to our Broker Support Team to assist.

Q: Can you make a copy of the application prior to submitting it?

A: No. A PDF is generated upon submission and can be located in 'View Applications'.

Q: How long does it take for the application status to update?

A: After it has been submitted, we receive a nightly file from CMS and status will update based on the information in that file.

Miscellaneous Questions

Q: How do we obtain our audio recording numbers? We just have them in our CRM and I'm not sure what number you want for the app.

A: The purpose of this field is to make it easy for you to tie the call recording to the enrollment. If the call recording system tied to your CRM does not generate a session or reference ID#, please enter another reference number that can connect the call with the enrollment.

Q: When is our book of business live?

A: At this time, Samaritan's new portal will capture 2025 enrollments only. Displaying your full book of business is a future enhancement.

Need Help?

Our Broker Support team is here to help.

SHPBrokerSupport@samhealth.org